

Performance and Development

Corporate Policy – Detailed requirements

You can read more about the [structure and expectations of performance conversations.](#)

The BBC is committed to all employees receiving regular feedback from their Team Leader to enable them to know how they are performing in their role and to consider their personal and career development.

Team Leaders will provide regular feedback discussions with their teams, meeting formally twice a year as a minimum. These two formal conversations allow goals to be set, feedback to be reviewed and career development to be discussed. It is a partnership approach which gives employees more responsibility for their performance and development plans and holds Team Leaders to account for making these conversations happen ensuring they are effective. This framework is called myConversation. myConversation ensures that employees have the opportunity to discuss and record with their Team Leader the contribution their work makes to their personal, team's and department's goals and also to discuss personal and career development matters taking into account:

- Individual and/or team performance in the current job;
- The achievement of goals;
- Personal and career development opportunities and the scope for personal and/or team performance improvement.

The conversations will be recorded in the my Development system which may be updated or replaced from time-to-time without altering the principles covered in this policy.

Performance and Development processes ensure that employees have the opportunity to discuss with their Team Leader the contribution their work makes to their personal, team and department goals.

Processes also enable employees and Team Leaders to discuss their personal and career development plan taking into account:

- individual and/or team performance in the current job
- the achievement of goals
- personal and career development opportunities and the scope for personal and/or team performance improvement

All feedback discussions, formal or informal, are a two-way conversation, with the employee and Team Leader having the opportunity to discuss the employee's performance and respond to any feedback.

Performance and Development Discussions - myConversation

A formal conversation will happen twice a year at set points linked to the Divisional Performance Review.

Employees on fixed term contracts are entitled to feedback on how they are performing in line with this policy. Team Leaders and employees will set goals at the beginning of the project and review performance at the end of the project or at the formal conversations.

At this meeting achievement against goals, how goals have been met, and general performance within the job are formally reviewed, along with an open and honest discussion about areas for development, aspirations and support required.

With regular, informal discussions during the year (or project) there should be no surprises in the formal conversation or end of project review.

The review discussion will include:

- a review of achievements against goals, if possible by the Team Leader who set them
- a review of performance in the job and how goals were achieved
- actions which could be taken to enhance performance in the job, e.g. training and development, opportunities to take part in projects
- setting goals for the year ahead, for the rest of the project or contract
- a discussion of future areas of work or personal plans.

The Performance and Development process is focused on goals, feedback and career development and is not the forum for discussing pay related matters. If an employee has an issue about their pay this can be raised at any time with their manager or through the submission of a salary appeal following the annual salary review.

Personal Development Form

The Personal Development form will conform to the following:

- All employees with over six months service will receive two formal conversations a year with their Team Leaders
- For new starters with less than six months service, it is recommended that a formal conversation to set goals happens at the beginning of the contract and a review before the end of their six month probation period.
- For employees on Fixed Term Contracts there will be an end of project/programme review which is documented and which can be used as a 'record of achievement' for any future work in the BBC.
- Adequate notice of the date of the conversation will be given so that Team Leaders and employees have time to think about performance and development over the period and any feedback, issues or questions they may wish to raise;
- All review discussions should take the form of a two-way conversation, with employee having the opportunity to discuss their performance and respond to

any feedback. If objectives have not been achieved, then it is important to discuss the reasons why. Account should be taken of factors over which the BBC Performance Management and Personal Development Policy Page 4 of 8 Last Updated 01.04.2017 employee had little or no influence and of objectives which have turned out to be unrealistic. It is equally important to use the opportunity to give positive feedback on objectives successfully achieved. In all cases, feedback should be objective, constructive and be based on specific examples rather than generalisations

The employee and Team Leader will document the two formal conversations in the MyDevelopment system.

In cases where, after discussion, the content of the end of year review form is not agreed between the employee and Team Leader, the Team Leader will submit the annual form with both the employee's and Team Leader's content to the HR Service Centre, for retaining on the employee's electronic record.

If an employee refuses to complete the form then the Team Leader may document the conversation on the form and send it to the HR Service Centre for retaining on the employee's personal file.

You can read more about [setting effective performance goals](#).

Goals

Goals are targets for the future, not just day-to-day tasks or activities. The main purpose is to provide a clear and motivating set of targets, focusing attention on the most important elements of the job (or a project) and giving clarity as to what is expected over a specified period. Guidelines for goals are as follows:

- Goals will be cascaded down the organisation. This means that Team Leaders will discuss goals with their team in the context of their own goals, divisional objectives and the BBC's objectives
- Goals will be discussed and set at least once a year or at the beginning of a project, with the opportunity to review them at the mid-year review or before depending on the speed of change. Employees will be required to draft their goals in the context of their job description, team and organisational goals. These will be discussed with the Team Manager and agreed. Employees on Fixed Term Contracts will have their goals at the start of the contract.
- There will be frequent and regular meetings through the year/project to discuss progress and possible barriers to achievement. It will be made clear to employees that the way in which goals are achieved will be appraised as well as what is achieved to reinforce the importance of appropriate behaviours at work

- Team Leaders will ensure, where possible, that the workload is spread as evenly as possible throughout the year (or project/programme) and discuss the support that they can provide in achieving the goals
- Goals will be set in the context of the job description and will take into account the resources and time span available.
- Goals will be written clearly to ensure the employee knows exactly what their objectives are and to enable the Team Leader to review the achievement and provide feedback.
- Career Development goals will focus on the development that an employee needs to enhance their performance on the job or to support them in achieving their career aspirations.
- Where employees spend a significant amount of their working time as part of a team, or can only achieve their goals as members of a team, Team Leaders may set, discuss and review team goals instead of or in addition to individual goals.

You can read more about the [goal review process and how it feeds into performance management](#).

Regular Feedback Discussions

As well as the two formal conversations, Team Leaders and employees will meet informally and regularly to discuss progress towards goals and day-to-day performance. The focus of the discussion will be the employee's performance and it can be used flexibly to discuss, for example:

- day to day performance and to seek feedback
- how tasks have been performed, not only what has been done
- a difficult task or aspect of the job and to seek advice
- areas where performance could be strengthened
- to raise any concerns about performance
- opportunities for short-term development (including, for example, training, advice and guidance)
- what the Team Leader will do to support the employee
- Both employees and Team Leaders are encouraged to instigate and contribute to these informal discussions and to share responsibility for ensuring a constructive conversation.

You can read more about [how to request time off for training and the approval process](#)

Our vision is to be the most creative organisation in the world and we will achieve this through our core mission; to deliver world class content and services that inform, educate and entertain our audiences.

For us to achieve this vision, we will support individuals in learning and development opportunities throughout their career at the BBC.

- The BBC considers training in some subjects to be so important that it is mandatory. This is referred to as “Core BBC Mandatory Training”. (see section four below).
- The BBC promotes the 70-20-10 view to learning and development; that is that most adults learn by a mix of on-the-job experience, interactions with others and via formal learning opportunities.
- Learning and development opportunities can take the form of on-the-job, informal and formal.

Some technical / specialist roles may require specific Continuing Professional Development (CPD) in order to maintain a licence to practice (solicitors, accountants etc.). It is the responsibility of the employee to ensure they achieve the required level of CPD. The BBC/parent department will fund the cost of the practicing licence where it is required in order to perform the duties of the role.

Types of training

Learning and development can take many forms and is not just achieved by completing a training course. Research shows that for adults the most effective learning, around 70%, is obtained on-the-job through job related experience, 20% through collaborating with others, coaching and mentoring and 10% via formal learning opportunities such as classroom and online learning. Examples of the different types of learning and development are shown below and should be discussed between the employee and their team leader.

Training needs can be identified at any time, but a useful time to discuss learning and development can of course be had in the personal development review discussion.

70%: On-the-job

Learning and development on the job can be the most beneficial for employees because it enables them to discover and refine their job-related skills, make better more informed decisions, address challenges and interact with influential people such as bosses and mentors within work settings. Employees also learn from their mistakes and receive immediate feedback on their performance. Examples include:

- on-job development, including exposure to particularly challenging situations;
- project work including project reviews and lessons learned
- work shadowing;
- attachments;
- secondments or exchanges;

- hot shoes; and
- 80/20 programme

20%: Informal learning

Informal learning takes place when employees learn from others through a variety of activities that include social learning, coaching, mentoring, collaborative learning and other methods of interaction with peers. Encouragement and feedback are prime benefits of this valuable learning approach. Examples include:

- myConversation and 360 feedback
- coaching and mentoring;
- networking; and
- self led personal learning – including but not limited to utilising resources available on Learn@BBC such as articles, videos, podcasts, collaboration groups and learning pathways

10%: Formal learning

The BBC has a broad range of formal virtual, online and face to face training courses offered under a series of subject areas including:

- leadership;
- production;
- technical;
- journalism;
- personal development
- further education courses; and
- professional development events.

The BBC also offers apprenticeships to eligible members of existing staff to develop and upskill. Details can be found in the [Early Careers, Pre-employment Programmes and Staff Apprenticeships Policy](#).

Mandatory training

Some training is mandatory for everyone who works for the BBC, whilst other training is mandatory for specific roles. Minimum requirements for staff are determined by their roles within the Career Path Framework. It is the **responsibility of the team leader** to know which mandatory training the individual needs to complete and to ensure they have completed it. It is **the responsibility of the individual** to request this information

from their team leader (if it hasn't already been given) and to complete the training within the required timescales via the MyLearning section of Learn @ BBC.

The mandatory training requirements of all employees should be assessed on a regular basis – typically, at the start of a new role, or when responsibilities change.

Mandatory training is assigned using [myDevelopment](#) and you can see your assignments on the MyLearning page of Learn @ BBC. A number of requirements are assigned automatically. Where automatic assignments aren't in place, mandatory training super-users manually assign the training under the guidance of local management. [myDevelopment](#) holds a record of those who have completed mandatory training.

Further information about Core BBC Mandatory Training, including a full list of courses, the minimum requirements for each role and the names of the mandatory training super-users can be found on [Gateway](#).

The BBC is committed to protecting the privacy and security of your personal information.

Our [People Privacy Notice](#) describes how we collect and use personal information about you during and after your working relationship with us, in accordance with the General Data Protection Regulation 2016/679 ([GDPR](#)). If you require further details as to how your personal data is processed, we ask that you refer to this document, which is incorporated into this policy by reference.

Additional information about how we use your personal information and how long we keep it for can be found in [the Data Protection Handbook](#) and our [Corporate Retention Schedule](#).

It is your responsibility to familiarise yourself with the BBC's data processing policies and notices set out above. If you have any queries regarding the processing of data by the BBC, please contact your team leader.

Time off for training

Employees will be supported in their learning and development, balancing individual needs with the requirements of the business.

- Lots of learning material is available through Learn @ BBC, both formal and informal.
- Employees should speak to their team leader if they'd like to complete any formal learning within working hours.
- Employees considering time off for external formal training, such as an accredited programme leading to a recognised qualification or shorter unaccredited training to help develop specific skills relevant to their job, will need to make a formal request.

Formal requests for time off for training

- To make a request for time off to train the employee must have worked for the BBC continuously for at least 26 weeks on the date they make their request.
- Employees may make requests to undertake any type of training which they believe will improve their effectiveness in the BBC as well as the performance of the BBC.
- Training can include accredited programmes, leading to the award of a recognised qualification; or shorter unaccredited training to help employees develop specific skills relevant to their job, workplace or business.
- Employees may only submit one request in any rolling 12 month period.
- There is no limit on the amount of time, or the amount of study or training that an employee can request.
- If your request is for 3 months' continuous time off or more, it may be appropriate to consider taking a career break. You can find out more in [Career breaks](#).
- There is no right to be paid for the time spent training; whether you will be paid for your time spent training should be agreed with your team leader and approved by the divisional HR Director.

Procedure for Applying

Submitting the Request

An employee should submit a request in writing to their Team Leader.

Considering the Request

The team leader should consider the request against the following factors: (the request can only be declined for business reasons against one of the following factors)

- Anticipated impact of the proposed study or training on the employee's effectiveness in their role;
- Anticipated impact of the proposed study or training on the performance of the business;
- The level of additional costs the study or training will require i.e. backfill;
- Anticipated impact of the proposed study or training on the ability of the business to meet customer demand;
- The ability to reorganise work among existing workers;
- The ability to recruit additional workers;
- Anticipated impact of the proposed study or training on quality;

- Anticipated impact of the proposed study or training on individual performance;
- Consider whether there would be an insufficiency of work during the periods the employee proposes to work;
- Consider whether there are planned structural changes during the proposed study or training period.

Responding or Meeting with the Employee

Within 28 days of receiving a completed Time off for Training request form an employee's team leader should either:

- Accept the request on the basis of the information set out in the written request. If accepted, this should be confirmed in writing; or
- Meet with the employee to discuss the request. Within 14 days of the meeting, the team leader must inform the employee of their decision in writing.

Where the team leader meets with the employee to discuss their proposal, the employee has a right to be accompanied by an accredited trade union representative or a BBC colleague (other than a practising lawyer), and the employee will be advised of that right prior to the meeting.

Communicating Decisions

The decision will need to be confirmed to the employee in writing in accordance with the timeframes specified above. The law requires that certain information is included in the response (even if the team leader is agreeing to the request). Team leaders should contact Manager Advice for guidance on this.

Right of Appeal

The employee has the right of appeal against the outcome of the decision. All appeals will be conducted in accordance with the [BBC Appeals Policy](#).

Before and after attending training

To get the most value out of training, there should be a conversation between the team leader and the employee about what the individual learning objectives are and importantly a discussion following the training to understand what skills have been gained, how that will be used to achieve business and personal objectives, and update the employee's work and career goals on [myDevelopment](#).

- Team leaders must ensure employees have sufficient time to complete the necessary pre-requisites.
- Employees must commit to completing the necessary pre-requisites.

- Employees agree to respond in a timely manner to requests for constructive feedback on the training they have received (known as training evaluation), so that future training can be adapted and improved accordingly.

Conduct

When attending training, employees are expected to continue to observe the normal standards of behaviour expected of employees.

Employees are expected to continue to observe the provisions regarding intellectual property contained in their contracts of employment and also the provisions of the [BBC Photography, Recordings, Patents & Inventions Policy](#) whilst undertaking their training.

Cancellation, non-attendance and waitlist

The BBC is investing time and money in supporting employees' development by providing learning and development opportunities. In return, we expect employees' to make every effort to attend all organised training. If an employee needs to cancel their place on an internal training course, they should cancel online and inform their team leader as soon as possible.

Late cancellations and non-attendance on internal training courses, will be reported back to the employee's department on a quarterly basis, with details of the financial cost of the cancelled place to the BBC.

Appropriate substitute delegates will be accepted at any time and in such cases no cancellation report will be created.

If a bespoke course has been set up specifically for a team/department then 100% of the total course cost is charged if that course is then cancelled 14 days or less before the course date. More than 14 days there is no cancellation charge.

Waitlist bookings

If an employee has been added to a waiting list for a place on a training course, a place may become available at any time between the time of the wait list request and the day before the course. Waitlist bookings can be cancelled on [myDevelopment](#) at any point if the employee can no longer attend on that date or if the training is no longer required.

Each of us is responsible for our own career and team leaders have a role to play to support and coach team members about theirs. Team leaders are not expected to have all the answers, but they can help employees think through what they want to do next and what support they might need; this includes ensuring employees can have access to the relevant learning and development linked to achieving business and personal development objectives identified. Team leaders should:

- Have twice yearly career development conversations with employees. Help them to identify what skill gaps exist between an employee's present situation and their aspiration and encourage regular elearning.
- Agree any points that should be kept confidential to maintain trust. Any actions from your conversation need to come from the employee and, if you have any, make sure you follow up on them quickly.
- Guide the employee towards Career Support for information on who else they could talk to or any courses and events available to them.

Funding/costs of training

Training is free for licence fee-funded divisions, whereas non-licence-funded departments, commercial subsidiaries and charities are charged for their training. We are obliged by the BBC's Fair Trading Guidelines to charge at an agreed rate.

If a bespoke course has been set up specifically for a team/department then 100% of the total course cost is charged if that course is then cancelled 14 days or less before the course date. More than 14 days there is no cancellation charge.

Financial assistance may be provided to employees who voluntarily (rather than by instruction from the BBC) take up external education courses relevant to their career development.

- Provision of assistance is at the discretion of the BBC and will be funded by the employee's division. DAG approval must be sought before any assistance is given.
- Employees must have a minimum of one year's service to be eligible to apply for financial assistance.
- Applications for assistance may be considered if a course is of benefit to the BBC because it is relevant to an employee's current role or anticipated future role.
- To be considered for financial assistance for relevant degree course fees an employee must be able to demonstrate, where appropriate, that they have obtained the maximum assistance from the Local Education Authority and this is insufficient to cover the full degree course fees.
- Employees are expected to attend their course outside of their normal working hours where possible. See section 5 for time off for training,

Requirements

The following requirements must all be met in order to qualify for external education assistance:

- The course will contribute to business objectives now or at a point in the future.

- The course is relevant to the employee's career development.
- If an employee needs to attend the course during working hours, the employee can be spared to attend the full course.
- The benefit of attending the course cannot be met by internal training programmes.
- The employee's contract extends beyond the end date of the further education course.
- The employee is not under a formal disciplinary or performance process.

Financial assistance for external education courses covers course and examination fees, textbooks and equipment. The level of financial assistance should be agreed with your Team Leader and approved by the divisional HR Director.

Course and Exam Fees

Course fees will normally be paid in instalments, subject to the production of appropriate invoices and satisfactory progress and attendance. If progress and attendance is unsatisfactory, instalments will be withheld and no further funding provided. In the event of failure on a course, assistance will not normally be agreed a second time for the same course. Examination fees will be refunded on production of receipts.

Text books and Equipment

When employees are unable to obtain the necessary books and equipment through sources such as the college or local library, assistance will be granted to purchase course text books and equipment within the overall agreed level of financial assistance (receipts for the purchases must be produced).

Payback period

Employees in receipt of financial assistance, whether they successfully complete their course or not, are expected to remain employed with the BBC for a continuous period of 2 years following the completion or end of their course. Where this is not possible due to the employee's resignation or the termination of their employment by the BBC on the grounds of their conduct or capability except where set out below, the employee must repay the whole or a proportion of the financial assistance on the following basis via the HR Service Centre:-

Length of employment following completion of course

Up to 6 months

Proportion of financial assistance to be repaid

100%

Between 6 and 12 months	75%
Between 12 and 18 months	50%
Between 18 and 24 months	25%
Greater than 24 months	0%

The payback period does not apply to employees in receipt of financial assistance who are:

- made redundant (including voluntary redundancy); or
- whose employment is terminated on the grounds of medical incapacity.

You may read more about [managing underperformance and providing constructive feedback](#).

Definition

These detailed requirements set out the procedure to be followed where an employee fails to reach or maintain the required standards of job performance through a lack of knowledge, skill or ability.

The **BBC Disciplinary Policy** will be used where the failure to perform to the standards required is a matter of misconduct.

The BBC reserves the right to implement the capability procedure at any of the stages as set out below, taking into account the relevant circumstances including the level of poor performance, the nature of the role and the performance issues in question. In particular in cases of gross negligence or in any case involving an employee who has not yet completed their probationary period, dismissal without following the capability procedure may be appropriate.

The BBC is committed to protecting the privacy and security of your personal information

Our [People Privacy Notice](#) describes how we collect and use personal information about you during and after your working relationship with us, in accordance with the General Data Protection Regulation 2016/679 (**GDPR**). If you require further details as to how your personal data is processed, we ask that you refer to this document, which is incorporated into this policy by reference.

Additional information about how we use your personal information and how long we keep it for can be found in [the Data Protection Handbook](#) and our [Corporate Retention Schedule](#).

It is your responsibility to familiarise yourself with the BBC's data processing policies and notices set out above. If you have any queries regarding the processing of data by the BBC, please contact your manager.

Principles

- Employees are expected to be capable of carrying out the work they are engaged to do at the required standard.
- Reasonable efforts should be made to informally address issues of under-performance without instigating the Formal Procedure.
- Managers are required to provide an employee with a reasonable opportunity to improve and support to achieve the required standard of performance. The period of time to improve and level of support must be balanced against the needs of the business.
- At any formal meetings employees have the right to be accompanied by an accredited trade union representative or a BBC colleague (other than a practicing lawyer), and the employee will be advised of that right prior to the meeting. The companion should be allowed to address the meeting in order to present the employee's case.
- There is no minimum period of notice for the formal capability meetings, but the member of staff will be permitted sufficient time to contact and brief an accredited representative or BBC colleague.
- Employees must take all reasonable steps to attend formal capability meetings. Failure to attend a meeting without good reason may be treated as misconduct.
- Employees have the right to state their cases at formal capability meetings before decisions are reached.
- The employee will not be eligible for any pay increase due during the period of any Improvement Plan. This will be reviewed and the pay increase reinstated at the point when the employee has consistently met the required performance standard.
- Manager Advice will be available to provide advice and guidance to the manager.
- At any formal meeting, the hearing manager may arrange a note taker to take summary notes of the meeting. A copy of the summary notes will be sent to the employee and their representative (if appropriate) for comment. Provided comments are received within a reasonable timeframe, as defined by the hearing manager, they will be held with the original notes from the meeting.
- If appropriate managers should refer to the **Guide to Supporting, Retaining & Recruiting Disabled Staff** and where necessary advice should be sought from Access & Disability Services.

Informal Action

In the normal course of employment, managers will discuss with an employee their performance, providing regular feedback.

Managers are responsible for setting realistic standards of performance, for explaining these standards to employees and for the provision of training, support and guidance, where appropriate, so that the employee has the opportunity to perform well.

The manager and the employee should aim to discuss any under-performance issues at or around the time they arise.

Prior to the instigation of the formal procedure the manager will ensure that an employee has been advised of their under-performance and will provide support and assistance so that the employee has the opportunity to achieve the required standard. Support may include the provision of training, development, advice, guidance or other support. As part of this process the manager will advise the employee that failure to reach the required performance standard may result in the formal procedure being instigated. This will be confirmed in writing.

Where informal action does not achieve satisfactory results or if informal action is not appropriate, the Formal Procedure will be implemented.

You may read more about [the formal capability procedure and how to implement an Improvement Plan.](#)

Formal Procedure

The BBC reserves the right to implement the capability procedure at any of the stages as set out below, taking into account the relevant circumstances including the level of poor performance, the nature of the role and the performance issues in question. In particular in cases of gross negligence or in any case involving an employee who has not yet completed their probationary period, dismissal without following the capability procedure may be appropriate.

Principles

- Employees are expected to be capable of carrying out the work they are engaged to do at the required standard.
- Reasonable efforts should be made to informally address issues of under-performance without instigating the Formal Procedure.
- Managers are required to provide an employee with a reasonable opportunity to improve and support to achieve the required standard of performance. The period of time to improve and level of support must be balanced against the needs of the business.

- At any formal meetings employees have the right to be accompanied by an accredited trade union representative or a BBC colleague (other than a practicing lawyer), and the employee will be advised of that right prior to the meeting. The companion should be allowed to address the meeting in order to present the employee's case.
- There is no minimum period of notice for the formal capability meetings, but the member of staff will be permitted sufficient time to contact and brief an accredited representative or BBC colleague.
- Employees must take all reasonable steps to attend formal capability meetings. Failure to attend a meeting without good reason may be treated as misconduct.
- Employees have the right to state their cases at formal capability meetings before decisions are reached.
- The employee will not be eligible for any pay increase due during the period of any Improvement Plan. This will be reviewed and the pay increase reinstated at the point when the employee has consistently met the required performance standard.
- Manager Advice will be available to provide advice and guidance to the manager.
- At any formal meeting, the hearing manager may arrange a note taker to take summary notes of the meeting. A copy of the summary notes will be sent to the employee and their representative (if appropriate) for comment. Provided comments are received within a reasonable timeframe, as defined by the hearing manager, they will be held with the original notes from the meeting.
- If appropriate managers should refer to the **Guide to Supporting, Retaining & Recruiting Disabled Staff** and where necessary advice should be sought from Access & Disability Services.

Step 1: First Capability Meeting

The manager will write to the employee notifying them of the concerns over their performance and the basis of those concerns, and will invite them to a meeting to discuss the matter.

At the meeting the employee's manager will explain the way in which the required standard has not been met, using examples to support concerns. Through discussion with the individual, the manager will seek to identify the reasons for the unsatisfactory performance.

Following the meeting, if the manager decides that it is appropriate to do so, the employee will be issued with a written Improvement Note setting out the areas in which the employee has not met the required performance standards. A formal Improvement Plan will be initiated setting out the improvement that is required, the standard to be reached and time within which it must be achieved.. The Improvement Note will stipulate that failure to reach the required performance standard may result in further formal action being taken and could lead to dismissal.

The Improvement Note will be disregarded for capability purposes after 12 months or such other period as specified at the time it is issued.

Improvement Plan

An Improvement Plan aims to enable the individual to achieve the required standard of performance.

The plan will include clear, measurable, realistic objectives and timelines. Performance progress will be reviewed periodically. Specific actions will be detailed and may include training and development activities, advice, guidance, or support activities.

When issuing an Improvement Plan the manager will ensure the length of the plan is reasonable by taking into account all of the relevant circumstances including:-

- the level of poor performance;
- the performance issues in question and improvement required; and
- the nature of the role.

The length of the plan would not normally exceed three months.

Interim Review

During the Improvement Plan, the employee's manager will usually hold at least one interim review meeting to assess the individual's performance against the Improvement Plan period to date.

Where progress towards the objectives is satisfactory, it will be recognised and continued improvement encouraged. If the individual is not making sufficient progress towards the objectives the manager will discuss with the employee the further improvement that is required and any support that is needed.

Step 2: Second Capability Meeting

At the end of the Improvement Plan period, a meeting will be held to review the employee's performance. The manager will write to the employee in advance explaining the purpose of that meeting.

The possible outcomes of the meeting may include but are not limited to:

No further action: If the manager determines that the objectives have been met and the individual is performing at the required standard no further action will be taken. The employee will be informed in writing that they have achieved the required level and that they are expected to maintain that standard of performance.

Extension of the Improvement Plan: Where significant progress has been made in achieving the required standard but concerns remain, a manager may decide it appropriate to extend the Improvement Plan. The length of the extension will take into account the length of the previous Improvement Plan and the level of under-performance but cannot exceed the expiry of the Improvement Note.

Where the required standard of performance is not achieved during the extension of the Improvement Plan the employee will be required to attend a further Step 2 meeting.

Final written warning: If the objectives have not been met and the manager concludes that the under-performance may still be rectified by further support a final written warning and Improvement Plan may be issued to the employee. The warning will stipulate that failure to reach the required performance standard may result in dismissal or redeployment to another position. A final written warning will be disregarded for capability purposes after 12 months or such other period as specified at the time it is issued. In exceptional circumstances a warning may remain in force for more than 12 months or never be removed.

Step 3: Third Capability Meeting

At the end of a further Improvement Plan period, a meeting will be held to review the employee's performance. The manager will write to the employee in advance explaining the purpose of that meeting and that one of the possible outcomes may be dismissal or redeployment to another position.

The possible outcomes of the meeting may include but are not limited to:

Redeployment to another position - the manager may consider that this is appropriate as an alternative to dismissal. This may include demotion.

Dismissal with notice

No further action - this will follow the principles set out at Step 2 above.

The manager will inform the employee of their decision in writing.

Note: *Before a capability penalty is imposed on an accredited representative of a trade union recognised by the BBC, the capability proceedings will be discussed with a full time officer of the union concerned.*

Step 4: The Right to Appeal

Employees have a right of appeal against the decision under all formal stages of this procedure. All appeals will be conducted in accordance with the **BBC Appeals Policy**.